Dynamics 365 Sales
2019 release wave 2
October 2019-March 2020

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In this guide, you will be able to learn the most important things about this release wave. These will help you plan to onboard the release updates with confidence.

Top things to know

New capability highlights

The **2019 release wave 2**, brings to market significant new services and capabilities to enable digital transformation for businesses. For Dynamics 365 Sales, these new capabilities include:

- **Simplified lead management experience** introduces improvements across top scenarios related to lead management.

- **Contextual email communication.** Salespeople will be able to write email with context of the record they are working on, navigate between records, have multiple active draft emails open simultaneously, preview the content before sending, add attachments, and be able to use email templates to optimize commonly used tasks.

- **Microsoft Teams integration enhancements** help to connect Dynamics 365 records to Teams channels without leaving the Dynamics 365 app.

Key milestones

Get prepared to onboard the new 2019 release wave 2 updates with confidence. Early access to this release wave, October update, will start on **August 2nd, 2019** and will be generally available on **October 1st, 2019**.

For application administrators

End-user impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. Look for all features tagged "End users, automatically" in the release plan.

Watch the release overview video

Get an overview of the new capabilities and enhancements to Dynamics 365 Sales.
Visit: aka.ms/ROGS19RW2ROV
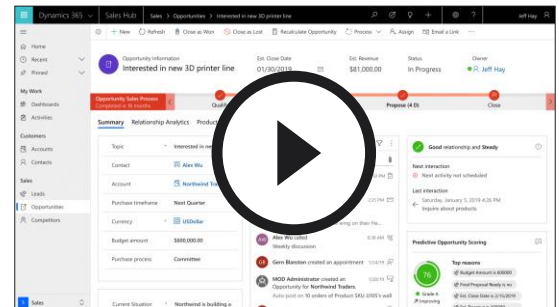
Read the release plan

Explore the entire set of new capabilities planned for 2019 release wave 2.
Visit: aka.ms/ROGS19RW2RP

Onboard new capabilities with confidence

Prepare to onboard the new capabilities in your production deployment by watching the deep-dive video series for Dynamics 365 Sales.
Coming soon!

Join the Dynamics 365 community

Visit: aka.ms/ROGS19RW2UC

Unlock Next.

Microsoft

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New capability highlights

These capabilities outline our commitment to deliver on our roadmap priorities. To learn more about the entire set of capabilities being delivered during this release wave, visit: aka.ms/ROGS19RW2RP

Simplified lead management experience

To help our customers maximize productivity, we are introducing improvements across top scenarios related to lead management.

Top scenarios include:

• Auto populate contact and/or company-related fields when a sales rep selects an existing contact and/or account at the creation of a new lead.
• Display notes and attachments captured by a sales rep when promoting a lead in the opportunity record after the lead is qualified.
• Enable sales reps to qualify leads and quickly move to the next stage of the sales cycle: optionally create opportunity, account, or contact records based on the organization-level settings configured by the admin for the lead creation experience. The default setting would be Yes, which would automatically create an account, contact, and opportunity when qualifying a lead.

▶ Watch the overview video: aka.ms/ROGS19RW2ROV1

Contextual email communication

With a rich text editor and a pop-up non-blocking window, composing email has never been better in Dynamics 365 Sales. Salespeople will be able to write email with context of the record they are working on, navigate between records, have multiple active draft emails open simultaneously, preview the content before sending, add attachments, and be able to use email templates to optimize commonly used tasks. The email opening up in a non-blocking window gives salespeople all the relevant content at a glance, while they compose their email to the customer.

▶ Watch the overview video: aka.ms/ROGS19RW2ROV2

Microsoft Teams integration enhancements

Dynamics 365 integration with Teams was introduced in April 2019. Enhancements help to connect Dynamics 365 records to Teams channels without leaving the Dynamics 365 app. Sellers will receive team member recommendations, during the connection flow, based on Dynamics 365 access privileges. To further improve the extensibility, file sharing can now be enabled for any out-of-the-box and custom entities, across Dynamics 365 and Teams connections. Connections refer to the ability to add a Dynamics 365 tab to a Teams channel. Feature details include:

• When connecting a Dynamics 365 record to a Teams channel, relevant members are suggested based on users associated with the Dynamics 365 record. Member suggestions will be available to a user if designated as a channel owner.
• SDK support is now available for the Microsoft Teams integration feature for any entity type, including custom entity types.
• When creating a Teams channel from the Dynamics 365 record page, users can automatically connect the Dynamics 365 record to the selected channel.

▶ Watch the overview video: aka.ms/ROGS19RW2ROV3

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Dynamics 365 Sales Insights enhancements

This release wave includes multiple enhancements to Dynamics 365 Sales Insights.

Top scenarios include:

- **More personalized and guided assistance**. Dynamics Assistant enables sellers to focus on what's most important—building relationships. Dynamics Assistant increases seller efficacy by helping sellers be proactive, productive, and personal.
- **Guiding sellers with next best actions through the Assistant Studio.** Use Microsoft Flow and the Assistant Studio to create new insight cards that adhere to particular business processes, surfaced to sellers at the right moment with the Dynamics assistant.
- **Capturing more customer communications**
- **Customizing scoring to adapt to organizational needs**
- **Improving seller coaching with Conversation intelligence.** Gain a deep understanding of coaching opportunities and unique visibility into customer conversations with a detailed view of learnings.

To learn more about the entire set of capabilities being delivered during this release wave, visit: aka.ms/ROGSI19RW2RP

▶ Watch the overview video: aka.ms/ROGSI19RW2ROV

June 10, 2019 ●	**Release plan available** Learn about the new capabilities coming in the 2019 release wave 2 (October 2019 – March 2020) across Dynamics 365 and the Power Platform.
August 2, 2019 ●	**Early access available** Try the new capabilities before they get enabled automatically for end-users as part of the 2019 release wave 2, October update.
October 1, 2019 ●	**General availability** Production deployment for 2019 release wave 2, October update begins.

Key milestones

Prepare to onboard the new release update with confidence.

Early access for the 2019 release wave 2, October update will start on **August 2nd, 2019.** General availability is **October 1st, 2019.**

Update process and global rollout

Early access

Application administrators can try out new capabilities in a non-production deployment prior to receiving release updates in their production deployment starting on August 2nd, 2019. Learn how to enable access to these enhancements with confidence. Visit: aka.ms/EarlyAccessFeatures

General availability

The 2019 release wave 2, October update will be deployed in production environment for all customer starting October 1st, 2019. For more information on specific timelines, please visit: aka.ms/ROGS19RW2GAT

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For application administrators

End-user impacting features to the user experience enabled automatically

End-user impacting features should be reviewed by application administrators. This facilitates release change management and enables successful onboarding of new capabilities released to market. For the complete list, look for all features tagged "End users, automatically" in the release plan.

Features that must be enabled by application administrators

This release wave contains features that must be enabled or configured by administrators, makers, or business analysts to be available for their end users. For the complete list, look for all features tagged "End users by admins, makers, or analysts" in the release plan.

Get the most out of Dynamics 365

Release plan   aka.ms/ROGS19RW2RP

View all capabilities included in this release.

Release calendar   aka.ms/ROGS19RW2RC

Know important release milestones.

Product releases   aka.ms/ROGS19RW2PR

Stay up to date on product updates.

Licensing guide   aka.ms/ROGS19RW2LG

Improve your understanding of how to license Dynamics 365.

User community   aka.ms/ROGS19RW2UC

Engage with Dynamics 365 experts and peers in the community.

Upcoming events   aka.ms/ROGS19RW2E

Find and register for in person and online events.

Product documentation   aka.ms/ROGS19RW2PD

Find documentation for Dynamics 365.

Is this guide helpful?

☺ ☹   aka.ms/ROG19RW2Feedback